

4. In the **Save In** box, Word automatically saves the document in the Template folder and the document will appear in the General Tab. If you want to create custom categories for your templates in the **Template** folder, create a new subfolder and save it in that folder.

If you chose not to save it in the Templates folder, click the **Save In** ▼ arrow and select the location where you want to store the template.

5. Click the **Save** button to apply.

Mac Users:

1. The **Save As** dialog box appears on your screen.
2. In the **Save As** box, type a name for the form.
3. Click the **Format** ⇅ arrows and select **Document Template**



4. When you save a template in the **My Templates** folder, the template appears in the **My Templates** category of the Project Gallery when you click **File** on the menu bar and select **Project Gallery**. If you want to create custom categories for your templates in the **Project Gallery**, create a new folder and save it in that folder. The name you give that folder will appear in the **Category** list.

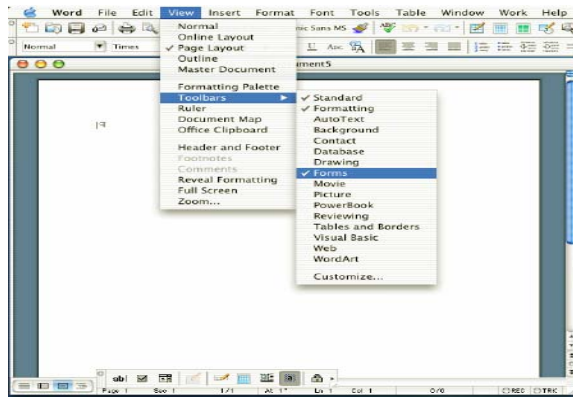
If you chose not to save it in the My Templates folder, click the **Where** ⇅ arrows and select the location where you want to store the template.

5. Click the **Save** button to apply.

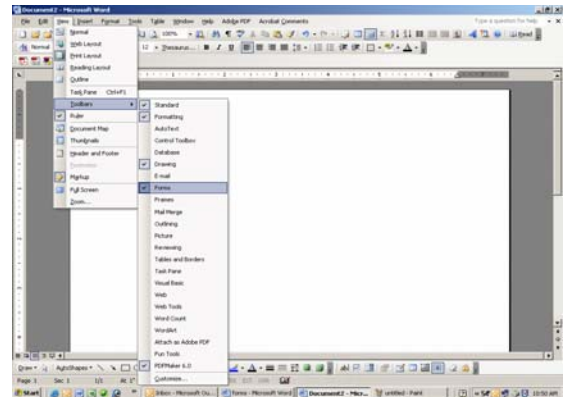
II. Entering Form Fields

1. Begin designing the form by sketching a layout first or if you are using an existing form as a guide decide where you would like to place fields for data to be entered.

2. Click **View** on the menu bar, select **Toolbars**, and select **Forms**.






Mac User



PC User



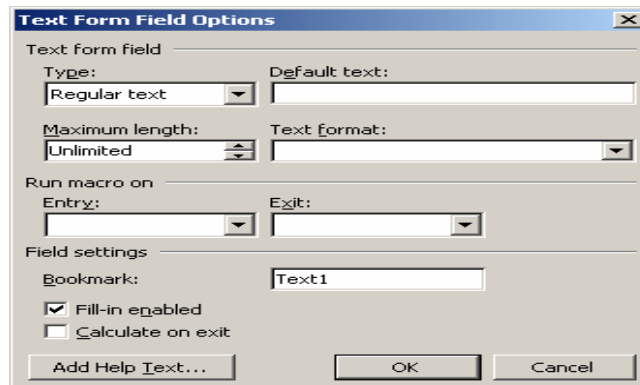
The Forms toolbar appears on your screen.

3. Now you can begin adding form fields for text boxes, check boxes, and drop-down lists.
 - ▶ Insert a fill-in field which will allow a user to enter text. Click the  **Text Form Field** button located on the Forms toolbar.
 - ▶ Insert a check box. Click the  **Check Box Form Field** button located on the Forms toolbar.
 - ▶ Insert a drop-down list box that restricts choices. Click the  **Drop-Down Form Field** button located on the Forms toolbar.

III. Edit or Set Properties for the Form Field

1. Double-click the form field that you inserted in your document that you wish to change.

2. Property Options:
 - a. **Text Form Field Options**



- 1) The **Type** list contains six field types you can use to achieve different results in a text form field.

Regular Text – Accepts text, numbers, symbols or spaces.

Number – Requires a number. If you want Word to verify the input of a number, for example an employee ID number, you need to automate the form.

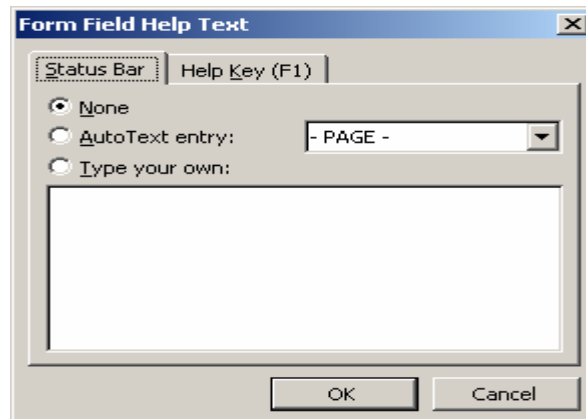
Date – Requires a valid date.

Current Date/Current Time – Displays current date or time. Users cannot fill in or change this field.

Calculation – Uses an =(Formula) field to calculate numbers, such as the sales tax on a subtotal. Users cannot fill in or change this field.

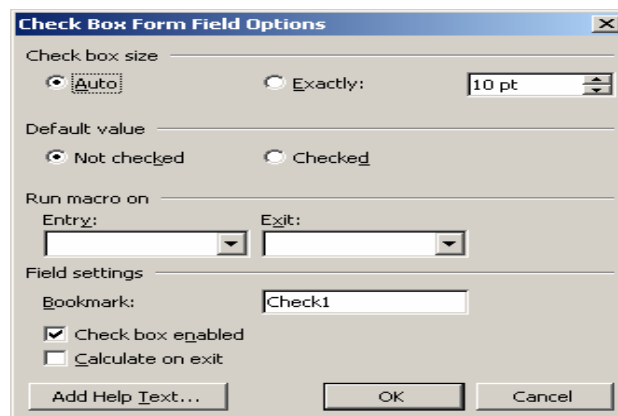
- 2) The **Default Text** box allows you to specify a default entry so that users does not have to type an entry unless they want to change the response.
- 3) The **Maximum Length** box allows you to limit the amount of characters the user can enter.
- 4) The **Text Format** list allows you to select a case type such as uppercase, lowercase, sentence case, etc.

- 5) The **Add Help Text** button allows you to display a message to assist the user.



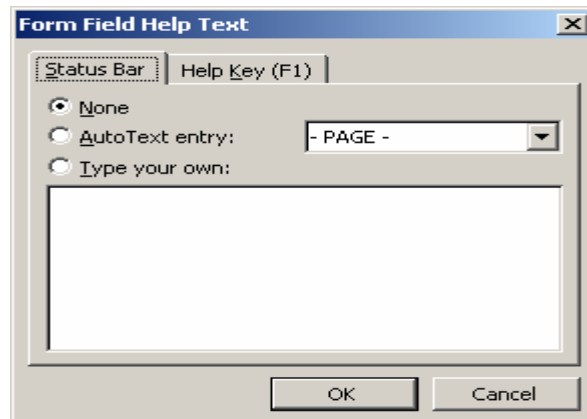
- a) To display Help Text in the status bar, click the **Status Bar** tab, select **Type Your Own**, type your message in the box, and click the **OK** button.
- b) To display Help Text in a message box when a user presses **F1**, click the **Help Key (F1)** tab, select **Type Your Own**, type your message in the box, and click the **OK** button.

b. **Check Box Form Field Options**



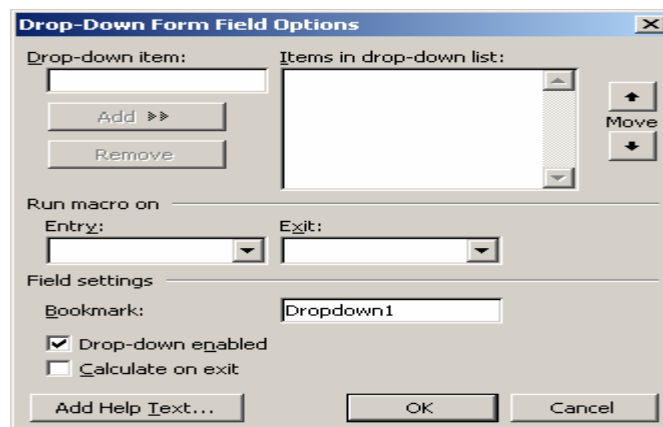
- 1) The **Check Box Size** allows you to set the size of the box.
- 2) The **Default Value** can be set to automatically have a check appear in the box or not.

- 3) The **Add Help Text** button allows you to display a message to assist the user.



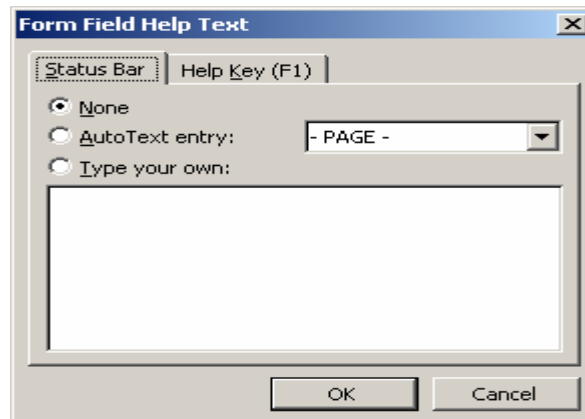
- a) To display Help Text in the status bar, click the **Status Bar** tab, select **Type Your Own**, type your message in the box, and click the **OK** button.
- b) To display Help Text in a message box when a user presses **F1**, click the **Help Key (F1)** tab, select **Type Your Own**, type your message in the box, and click the **OK** button.

c. **Drop-Down Form Field Options**



- 1) To add an item to the drop-down list, type the name of the item in the **Drop-Down Item** box and click the **Add** button.
- 2) To remove an item from the drop-down list, select the item in the **Items In Drop-Down List** and click the **Remove** button.
- 3) To move an item in the list, click the item in the **Items In Drop-Down List** then click the **Move** arrow buttons.


- 4) The **Add Help Text** button allows you to display a message to assist the user.



- a) To display Help Text in the status bar, click the **Status Bar** tab, select **Type Your Own**, type your message in the box, and click the **OK** button.
- b) To display Help Text in a message box when a user presses **F1**, click the **Help Key (F1)** tab, select **Type Your Own**, type your message in the box, and click the **OK** button.

IV. Locking the Form

Users cannot fill out a form until you add protection to it.



1. Click the  **Protect Form** button located on the Forms toolbar.
2. Click **File** on the menu bar and select **Save**.

The user can press the **Tab** key on the keyboard or click with the mouse to go from field to field to complete the form.

V. Modify Form




1. Open the document.

NOTE: Do not select **New** because it will open only a copy of the form.




2. Click the  **Protect Form** button located on the **Forms** toolbar to unlock the document.
3. Make the changes to the document.
4. Click the  **Protect Form** button.
5. Click **File** on the menu bar and select **Save**.

VI. Show or Hide Shading

Show Shading:

1. Open the document.
2. Click the  **Protect Form** button located on the **Forms** toolbar to unlock the document.
3. Click  **Form Field Shading** button located on the Forms toolbar. The shading should appear on the screen so users can quickly identify the fields they need to respond to. This shading does not print.
4. Click the  **Protect Form** button.
5. Click **File** on the menu bar and select **Save**.

Hide Shading:

1. Open the document.
2. Click the  **Protect Form** button located on the **Forms** toolbar to unlock the document.
3. Click  **Form Field Shading** button located on the Forms toolbar. The shading should disappear on the screen.
4. Click the  **Protect Form** button.
5. Click **File** on the menu bar and select **Save**.